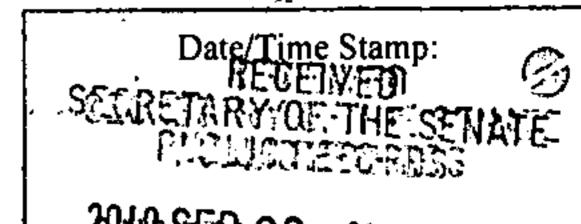
Employee Post-Travel Disclosure of Travel Expenses



Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

(Revised 1/3/11)

2019 SEP 30 AMID: 38

In compliance with Rube reimbursed/paid for		-	sures with respect to	travel expenses that have been or	w
	•	rization (Form RE-1), <u>A</u> rtification Form with all		y, invitee list, etc.)	
Private Sponsor(s) (list	tall): The PEW Ch	aritable Trust	<u></u>		
Travel date(s): Septe	mber 13 - Septem	ber 15, 2019			
Name of accompanyin Relationship to Travele	* '	ny): X Child	<u></u>		
	COSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addit		SE OR DEPENDENT CHILD, ONLY	(
Expenses for Employ	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)	
☐ Good Faith Estimate ☑ Actual Amount	\$58.00	168.00	\$132.00		
Expenses for Accomp	anving Spouse or De	pendent Child (if applic	able):	· · · · · · · · · · · · · · · · · · ·	•
Expenses for recomp	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)	
☐ Good Faith Estimate					
☐ Actual Amount					
Provide a description necessary.): Please	 -	ents attended. See Senat	te Rule 35.2(c)(6). (A	attach additional pages if	
9/21/2019 (Date)	Joe Hack (Printed)	name of traveler)		(Signature of traveler)	
TO BE COMPLETE	D BY SUPERVISING	MEMBER/OFFICER:			
	-	es set out above in conne tion, lodging, and related	d expenses as defined	scribed in the <i>Employee Pre-Trav</i> in Rule 35.	el

(Signature of Supervising Senator/Officer)

Form RE-2

PATROBERTS KANSAS JAMES E RISCH IDAHO

CHRISTOPHER COONS DELAWARE BRIAN SCHATZ HAWAD

Committee's website.

DESORAHS MAYER CHEF COUNSEL AND STAFF DIRECTOR ANNETTE GILLIS DEPUTY STAFF DIRECTOR

United States Senate

SELECT COMMITTEE ON ETHICS HART SENATE OFFICE BUILDING, ROOM 220 SECOND AND CONSTITUTION AVENUE, NE WASHINGTON, DC 20510-6425

Employee Privately-Sponsored Travel Checklist

Employees must submit their completed Pre-Travel Authorization Package to the Select Committee on Ethics (the Committee) at least 30 days prior to the travel departure date. Incomplete Pre-Travel Authorization Packages and Packages submitted later than 30 days prior to the travel departure date will not be considered or approved. All of the forms and materials listed below are available as fillable PDFs on the Committee's website at http://www.ethics.senate.gov.

Pre-Travel Authorization

Review Senate Rules and the Committee's Privately-Sponsored Travel Guidelines on the

☐ Ensure your supervising Senator or Officer (President of the Senate, Secretary of

the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the

Prior to Submitting a Pre-Travel Authorization Package to the Committee

		Minority, and Chaplain) has determined the expenses for the trip are necessary and reasonable.
		Ensure your supervising Senator or Officer has certified the proposed travel is connected to your official duties and will not create any appearance of a public
		office being used for private gain.
At Least	30 D	ays Prior to Travel: Submit Completed Pre-Travel Authorization Package
		File with the Select Committee on Ethics in SH-220
	ompl	ete Employee Pre-Travel Authorization Form (Form RE-1)
	Ŏ	Ensure this form is typed and that all of the fields are completed.
		Ensure your supervising Senator or Officer has signed this form.
		Personally sign this form.
☐ E	nsure	Pre-Travel Authorization Package is complete. A complete Package includes:
		Form RE-1
		Private sponsor invitation (the formal invitation, letter or e-mail you received
		from the private sponsor).
		Completed and signed Private Sponsor Travel Certification Form (4 page form
		that includes detailed information about the trip).
		All attachments to the Private Sponsor Travel Certification Form
		Complete and final itinerary
		☐ List of Senate invitees
		Any other necessary attachments
		a copy of your complete Pre-Travel Authorization Package for inclusion in your disclosure.
	_	-

Prior to Traveling: Receive a Letter of Approval from the Committee

Obtain a letter from the Committee. You may only accept the trip after receiving a letter from the Committee specifically authorizing your participation in the privatelysponsored travel.

Post-Travel Disclosure

Within 30 Days of Conclusion of Privately-Sponsored Travel: Submit Completed Post-Travel Disclosure Package

File with the Office of Public Records in SH-232

П	Encure	submission of Post-Travel Disclosure Package is timely.
_		Post-Travel Disclosure Packages must be submitted to the Office of Public
		•
		Records within 30 days of completion of Privately-Sponsored Travel. Trip
	O 1	extensions for any purpose do not extend this deadline.
		ete Employee Post-Travel Disclosure of Expenses Form (Form RE-2)
		Ensure this form is typed and that all of the fields are completed.
	u	Ensure your supervising Senator or Officer has signed the form after determining
		the actual trip expenses were necessary under Senate Rules and the Committee's
		Privately-Sponsored Travel Guidelines.
		Personally sign this form.
	Ensure	Post-Travel Disclosure Package is complete. A complete Package includes:
		Form RE-1
		Form RE-2
		Private sponsor invitation (the formal invitation, letter or e-mail you received
		from the private sponsor).
		Completed and signed Private Sponsor Travel Certification Form (verify with the
		private sponsor that you have the correct and final version of the form).
		All attachments to the Private Sponsor Travel Certification Form
		☐ Complete and final itinerary
		☐ List of Senate invitees
		Any other necessary attachments
266	contact	the Committee if you have any questions.
43¢	COHMICE	me communed it you have any questions.

Plea

Phone: (202)-224-2981 (202)-224-7416 Fax:

Form RE-1

(Revised 10/19/15)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler:	Joseph Hack
	Office of Senator Deb Fischer
Employing Office/Committee:	
The PEW Charitable True Private Sponsor(s) (list all):	ıst
September 13 - September 15, 201 Travel date(s): Note: If you plan to extend the trip for any reason	9
Note: If you plan to extend the trip for any reason	you must notify the Committee.
Destination(s): Annapolis, MD	· · · · · · · · · · · · · · · · · · ·
Explain how this trip is specifically connected to the trave	eler's official or representational duties:
, , <u> </u>	e office. By participating in this conference I will be able to engage and ecome a better chief and teach my staff how to develkop these skills
Name of accompanying family member (if any):	c, complete and correct to the best of my knowledge:
(Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING SENATOR/OFFIC Secretary for the Majority, Secretary for the Minority, and Chap	ER (President of the Senate, Secretary of the Senate, Sergeant at Arms,
Senator Fischer	Joseph Hack
(Print Senator's/Officer's Name)	y authorize (Print Traveler's Name)
related expenses for travel to the event described above. I	ent or reimbursement for necessary transportation, lodging, and have determined that this travel is in connection with his or her of create the appearance that he or she is using public office for
I have also determined that the attendance of the employed	e's spouse or child is appropriate to assist in the representation
of the Senate. (signify "yes" by checking box)	
8/24/2019	As Die
(Date)	(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

	\
	Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
. I	Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
. I	Dates of travel: September 13-15, 2019
. I	Place of travel: Annapolis, MD
. 1	Name and title of Senate invitees: Chiefs of Staff (see attached list)
_	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
. [I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
_	certify that: The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. AND
2	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

Private Sponsor Certification - Page 1 of 4

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Pew Charitable Trusts is the sole organizer and sponsor of this trip.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: See attachment.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	See attachment.

See attachment.				ļ
				
				<u>'</u>
	·			1
Total Expenses for E	ach Participant:			
	<u> </u>			
	Transportation	Lodging	Meal	Othe
	Expenses	Expenses	Expenses	Expens
	\$60/roundtrip	\$268	\$115.50	
Good Faith				
estimate				
☐ Actual				
Amounts				
congressional particip			ganized specifically a	to congression with regard to
This trip has been an	ranged specifically with re	gard to congression		
This trip has been an	anged specifically with re	egard to congression	nal participation.	with regard to
This trip has been an	ranged specifically with re	egard to congression	nal participation.	with regard to
This trip has been an	anged specifically with re	egard to congression	nal participation.	with regard to
This trip has been an	anged specifically with re	egard to congression	nal participation.	with regard to
This trip has been an Reason for selecting to Annapolis was select	anged specifically with re	egard to congression or trip nity to Washington,	nal participation.	with regard to
Congressional particip This trip has been an Reason for selecting to Annapolis was select Name and location of	ranged specifically with retained location of the event of the due to its close proximated due to its close proximated.	egard to congression or trip nity to Washington, cility:	nal participation. DC and its historical	with regard to
Congressional particip This trip has been an Reason for selecting to Annapolis was select Name and location of	ranged specifically with received due to its close proxing the hotel or other lodging fa	egard to congression or trip nity to Washington, cility:	nal participation. DC and its historical	with regard to
This trip has been and Annapolis was selected. Name and location of Annapolis Inna	che location of the event of the due to its close proximation of the action of the event of the due to its close proximation of the location of the event of the location of the locati	egard to congression or trip nity to Washington, cility:	nal participation. DC and its historical	with regard to
Congressional particip This trip has been an Reason for selecting to Annapolis was select Name and location of The Historic Inns of A Reason(s) for selectin	che location of the event of the location of the event of the due to its close proximation of the proximation of the event of the location of the lo	egard to congression or trip nity to Washington, cility: nnapolis, MD 2140	DC and its historical	significance.
Congressional particip This trip has been an Reason for selecting to Annapolis was select Name and location of The Historic Inns of A Reason(s) for selectin The Historic Inns can	che location of the event of the location of the event of the due to its close proximation of the proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the due to its close proximation of the event of the e	egard to congression or trip hity to Washington, cility: nnapolis, MD 2140* acility: neeting space for the	DC and its historical	significance.
Congressional particip This trip has been an Reason for selecting to Annapolis was select Name and location of The Historic Inns of A Reason(s) for selectin The Historic Inns can	che location of the event of the location of the event of the due to its close proximation of the proximation of the event of the location of the lo	egard to congression or trip hity to Washington, cility: nnapolis, MD 2140* acility: neeting space for the	DC and its historical	significance.

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:		
	Lodging and meals are at the federal per diem rate for Annapolis, MD.		
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:		
	Transportation to Annapolis will be provided via coach charter buses.		
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).		
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event: N/A		
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor): Signature of Travel Sponsor: [[[]]] [] [] [] [] [] [] [
	Name and Title: Tamera Luzzatto		
	Name of Organization: The Pew Charitable Trusts		
	Address: 901 E Street, NW, Washington, DC, 20004		
	Telephone Number: (202) 552-2000		
	Fax Number: (202) 552-2299		
	E-mail Address: tluzzatto@pewtrusts.org		

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and Leadership Conference, September 13-15, 2019 Annapolis, MD

- 1-10. See form.
- 11. See attachment.
- 12. See form.
- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the seventh Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
- 16. See form.
- 17. See form.
- 18. See form.
- 19. See form.
- 20. See form.
- 21. See form.
- 22. See form.
- 23. See form.
- 24. See form.
- 25. See form.



Friday, September 13, 2019

2:30pm	Depart Dirksen via buses
3:30-4:30pm	Maryland State House – Greeting by Senator Ben Cardin The oldest American state house in continuous legislative use, dating to 1771, and the U.S. Capitol from November 26, 1783, to August 13, 1784. Senator Cardin will welcome chiefs to his state capital and speak about his legislative experiences working across the aisle.
4:30pm	Walk to the Historic Inns of Annapolis. Luggage retrieval and hotel check-in.
6:00-8:00pm	Dinner – Governor's Mansion with Governor and Mrs. Hogan. Governor Lawrence J. Hogan, Jr. was sworn in as the 62nd governor of the State of Maryland on January 21, 2015. In 2018, he was re-elected to a second four-year term. Maryland's first lady is Yumi Hogan, a first-generation Korean-American, artist and teacher. Governor Hogan will address his challenges and successes leading a politically-divided state government.

Saturday, September 14, 2019

8:30-9:30am	Breakfast at your leisure, Historic Inns
9:30-11:00am	Amy Mitchell, Pew Research Center Social Media and the News. About two-thirds of American adults say they at least occasionally get news on social media, about the same share as at this time in 2017, according to a new Pew Research Center survey. Many of these consumers, however, are skeptical of the information they see there: A majority (57%) say they expect the news they see on social media to be largely inaccurate. Amy Mitchell will discuss the survey and its implications for policymakers.
11:00am-12:00pm	Break
12:00-1:15pm	Lunch Speaker: TBD

Conference Schedule

Professor Joanne Freeman (Yale University) The Field of Blood: Violence in Congress and the Road to Civil War. Professor Freeman recovers the long-lost story of physical violence on the floor of the U.S. Congress. Drawing on an extraordinary range of sources, she shows that the Capitol was rife with conflict in the decades before the Civil War. Professor Freeman will bring historical context and insight to today's partisan and factional challenges in Congress. 2:45-3:00pm David Pogue (The New York Times and CBS Sunday Morning) A.I., Robotics, and America in 2050. From 2000 to 2013, David Pogue was the New York Times weekly tech columnist. After a five-year detour to Yahoo Finance, he's now he's back at the Times, writing the "Crowdwise" feature for the "Smarter Living" section. He's a four-time Emmy winner for his stories on "CBS Sunday Morning," and a host of 17 science specials on "NOVA" on PBS. David will talk about the latest advances in artificial intelligence and robotics and the implications for policy makers, the U.S. economy, government, and society as a whole. 6:30-8:00pm Dinner Keynote Speaker – Derrick Wang, composer, "Scalia/Ginsburg" Derrick Wang serves on the faculty of the Peabody Conservatory of The Johns Hopkins University, where he designs and teaches interdisciplinary courses on music and law and lectures on the power of the arts to transcend political divides. Derrick will speak about the unexpected and unique bipartisan relationship between Supreme Court Justices Antonin Scalia and Ruth Bader Ginsburg centered around their shared appreciation for opera and lessons which can be learned and applied to the legislative branch. He will also share a few selections from his opera, "Scalia/Ginsburg" which was written using the actual words and opinions of the two justices.		
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Sunday, September 15, 2019

8:00-9:30am	Breakfast at your leisure, Historic Inns - Bag Call
9:30-11:30am	Ira Chaleff The Courageous Chief of Staff: The Art of Providing Guidance and Feedback to the Senator Ira Chaleff, Chairman Emeritus of The Congressional Management Foundation, and author of the award-winning book "The Courageous Follower: Standing Up To and For Our Leaders", will do a reprise of the well-received talk he gave at the 2009 Chiefs of Staff conference. While each Senator is unique, as is the relationship with the Chief, there are certain commonalities that occur in the exercise of power. These require close advisors to use courage and skill to minimize blind spots and maximize success. Ira will examine these with the chiefs and offer approaches to add to the existing tool kits the chiefs have developed.
12:00pm	Pick up box lunches
12:15pm	Buses depart
1:30pm	Arrive Capitol Hill

2019 Bipartisan Senate Chiefs of Staff Conference September 13-15, 2019 List of Invited Staff

First Name	Last Name	Senate Office
Steve	Abbott	Sen. Susan M. Collins
Michelle	Altman	Sen. James P. Lankford
Michelle	Barlow Richardson	Sen. Roger F. Wicker
Allyson	Bell	Sen. Mike Lee
Reynaldo	Benitez	Sen, Catherine M. Cortez Masto
Sarah	Benzing	Sen. Sherrod C. Brown
Cassie	Bladow	Sen. John H. Hoeven III
Tony	Blando	Sen. Ron H. Johnson
Daniel	Brandt	Sen. Pat J. Toomey
Joe	Britton	Sen. Martin T. Heinrich
Brennen	Britton	Sen. Jerry Moran
Joel	Brubaker	Sen. Shelley Moore Capito
Jami	Burgess	Sen. Maria Cantwell
Larry	Burton	Sen. Dan S. Sullivan
Neil	Campbell	Sen. Jack F. Reed
iol	Chaney	Sen. Kirsten E. Gillibrand
Steve	Chartan	Sen. Ted Cruz
David	Cleary	Sen. Lamar Alexander
Dara	Cohen	Sen. Jacklyn S. Rosen
Caryn	Compton	Sen. Bernie Sanders
John	Connell	Sen. Todd C. Young
Kathleen	Connery Dawe	Sen. Angus S. King Jr.
Jackie	Cattrell	Sen. Pat Roberts
Doug	Coutts	Sen. Tom Cotton
Aaron	Cummings	Sen. Chuck Grassley
Dayne	Cutrell	Sen. Richard C. Shelby
Jonathan	Davidson	Sen. Michael F. Bennet
Jennifer	DeCasper	Sen. Tim E. Scott
J.P.	Dowd	Sen. Patrick J. Leahy
Eric	Einhorn	Sen. Brian E. Schatz
Kaitlin	Fahey	Sen. Tammy Duckworth
Eric	Feldman	Sen. Gary C. Peters
Charles	Flint	Sen. Marsha Błackburn
Kristen	Gentile	Sen. Bob Casey
Lisa	Goeas	Sen. Joni K. Ernst
Marc	Goldberg	Sen. Maggie Hassan
Samuel	Goodstein	Sen. Sheldon Whitehouse
David	Grannis	Sen. Dianne Feinstein
Dana	Gresham	Sen. Doug Jones
Mark	Gruman	Sen. Kevin J. Cramer

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Joe Coti	Haia	Sen. Mazie K. Hirono
Mike		Sen. Mark R. Warner
	Harney	Sen. Joe Manchin III
Patrick	Hayes	Sen. Rand Paul
William	Henderson	
Mike	Henry	Sen. Tim M. Kaine
Allison	Herwitt	Sen. Chris S. Murphy
Natasha Tank Mario	Hickman Hissins	Sen. Richard M. Burr Sen. John N. Boozman
Toni-Marie	Higgins Helland	Sen. James M. Inhofe
Luke	Holland	Sen. James W. Hillore Sen. James E. Risch
John Mark	Insinger Isakowitz	Sen. Rob J. Portman
Mark Both	Jafari	Sen. John Cornyn III
Beth		Sen. Mike Rounds
Mark	Johnston	
Meg	Joseph	Sen. Kyrsten Sinema Sen. Mike Braun
Joshua	Kelley	Sen. Richard Blumenthal
Joel	Kelsey Kirchner Carr	Sen. Johnny Isakson
Joan		Sen. Mike B. Enzi
Coy	Knobel	Sen. Kamala D. Harris
Rohini Chad	Kosoglu Kreikemeier	Sen. Jeanne Shaheen
_	Kunsman	Sen, John A. Barrasso
Dan Dylan	Laslovich	Sen. Jon Tester
Ted	Lehman	Sen. Thom R. Tillis
Mindi	Linquist	Sen. Patty Murray
Jeff	Lomonaco	Sen. Tina Smith
Christopher	Lynch	Sen. Ben L. Cardin
Michael	Lynch	Sen. Charles E. Schumer
Becky	Marr	Sen. John Thune
Philip	Maxson	Sen. Mitch McConnell
Stacy	McBride	Sen. Roy D. Blunt
Jeffrey	Michels	Sen. Ron Wyden
Anne	Morris Reid	Sen. Elizabeth A. Warren
Bill	Murat	Sen. Tammy Baldwin
Mike	Needham	Sen. Marco Rubio
Ryan	Nelson	Sen. John Thune
Bianca	Ortiz-Wertheim	Sen. Tom S. Udall
Mike	Pawlowski	Sen. Lisa A. Murkowski
Elizabeth	Peluso	Sen. Amy Klobuchar
Richard	Perry	Sen. Lindsey Graham

2019 Bipartisan Senate Chiefs of Staff Conference September 13-15, 2019 List of Invited Staff

	<u> </u>	
First Name	Last Name	Senate Office
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred	Turner	Sen. Bob Menendez
Matt	Van Kdiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley



Bipartisan Senate Chiefs of Staff Conference Annapolis, Maryland | September 13-15, 2019



Bipartisan Senate Chiefs of Staff Conference

The Pew Charitable Trusts

Invites You and Your Spouse/Significant Other
To the 7th Biennial

Senate Chiefs of Staff Management and Leadership Conference

Annapolis, Maryland September 13-15, 2019

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 13-15, 2019, in Annapolis, Maryland. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the agenda is attached.

We will depart from behind the Dirksen Building on Friday, September 13, on a chartered bus and return on Sunday, September 15. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$175) after the conference.

Your pre-travel paperwork is due to the Select Committee on Ethics, 220 Hart, <u>no later than Wednesday</u>. August 14, 2019. You do not need to list accompanying spouses/significant others on the ethics form. Click here to download the paperwork.

Click here to register

If you are unable to attend, please <u>click here</u>.

We look forward to seeing you in historic Annapolis this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

PAT ROBERTS, KANSAS JAMES E. RISCH, IDAHO BRIAN SCHATZ, HAWAII JEANNE SHAKEEN, NEW HAMPSHIRE

DEBORAH SUE MAYER, CHIEF COUNSEL AND STAFF DIRECTOR
CAMI MORRISON, CHIEF CLERK

TELEPHONE: (202) 224-2981 FACSIMILE: (202) 224-7416 TDD: (202) 228-3752

United States Senate

SELECT COMMITTEE ON ETHICS

September 3, 2019

Joe Hack Office of Senator Deb Fischer United States Senate Washington, DC 20510

Dear Mr. Hack:

This responds to your recent correspondence concerning an invitation you received to travel to the *Bipartisan Senate Chiefs of Staff Conference* in Annapolis, Maryland, on September 13–15, 2019, sponsored by The Pew Charitable Trusts (Pew). Pew certified to the Select Committee on Ethics (the Committee) that it will pay the *necessary expenses*¹ related to the travel and that it is neither a lobbyist, nor lobbying firm, nor agent of a foreign principal, and it is not otherwise acting as a representative or agent of a foreign government. However, Pew has certified that it is an organization designated under § 501(c)(3) of the Internal Revenue Code² that retains or employs a registered lobbyist and that no registered lobbyist or agent of a foreign principal will accompany you at *any point throughout your trip*.³

Based on information and materials available to the Committee, and assuming the actual travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip may be accepted under relevant Senate Rules and the Committee's Regulations and Guidelines for Privately-Sponsored Travel, so long as at the time of the payment or reimbursement, Pew is neither a registered lobbyist nor lobbying firm under the Lobbying Disclosure Act of 1995, nor an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel*

¹ The term "necessary expenses" has a specific definition. See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms at 8.

² 26 U.S.C. § 501(c)(3).

³ The term "any point throughout your trip" has a specific definition. See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms at 2.

Certification Form, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) within 30 days of the conclusion of Privately-Sponsored Travel.

Finally, Senate Rule 34 requires a reporting individual⁴ on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Deborah Sue Mayer

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Chief Counsel and Staff Director

Enclosure: Travel Checklist

⁴ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$127,914 for CY 2019) or is a political fund designee and is required to file Financial Disclosure Reports.

PAT ROBERTS, KANSAS JAMES E. RISCH, IDAHO BRIAN SCHATZ, HAWAII JEANNE SHAHEEN, NEW HAMPSHIRE

DEBORAH SUE MAYER, CHIEF COUNSEL AND STAFF DIRECTOR CAMI MORRISON, CHIEF CLERK

United States Senate

SELECT COMMITTEE ON ETHICS

Employee Privately-Sponsored Travel Checklist

Employees must submit their completed Pre-Travel Authorization Package to the Select Committee on Ethics (the Committee) at least 30 days prior to the travel departure date. Incomplete Pre-Travel Authorization Packages and Packages submitted later than 30 days prior to the travel departure date will not be considered or approved. All of the forms and materials listed below are available as fillable PDFs on the Committee's website at http://www.ethics.senate.gov.

Pre-Travel Authorization

☐ Review Senate Rules and the Committee's Privately-Sponsored Travel Guidelines on the

Prior to Submitting a Pre-Travel Authorization Package to the Committee

Committee's website.
Ensure your supervising Senator or Officer (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority and Chaplain) has determined the expenses for the trip are necessary and reasonable.
Ensure your supervising Senator or Officer has certified the proposed travel is connected to your official duties and will not create any appearance of a public office being used for private gain.
At Least 30 Days Prior to Travel: Submit Completed Pre-Travel Authorization Package
File with the Select Committee on Ethics in SH-220
☐ Complete Employee Pre-Travel Authorization Form (Form RE-1)
Ensure this form is typed and that all of the fields are completed.
Ensure your supervising Senator or Officer has signed this form.
Personally sign this form.
Ensure Pre-Travel Authorization Package is complete. A complete Package includes:
☐ Form RE-1
Private sponsor invitation (the formal invitation, letter or e-mail you received from the private sponsor).
☐ Completed and signed Private Sponsor Travel Certification Form (4 page form
that includes detailed information about the trip).
All attachments to the Private Sponsor Travel Certification Form
Complete and final itinerary
☐ List of Senate invitees·
Any other necessary attachments
☐ Retain a copy of your complete Pre-Travel Authorization Package for inclusion in your
required post-travel disclosure.